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## Poland

### Fresh Deciduous Fruit

### Fresh Apples and Concentrated Apple Juice

**2006**

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**Report Highlights:**

The MY2006/2007 apple production is estimated to be 2.4 million tons which will result in high level of concentrated apple juice (CAJ) production. Because of EU-wide production increases, prices for apples and CAJ could be lower than in MY2005/2006. Consequently, the volume of exports will increase considerably in comparison with the previous season, while the value will increase only marginally.

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Includes PSD Changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
Warsaw [PL1]  
[PL]

**Table of Contents**

<b>Executive Summary .....</b>	<b>3</b>
<b>Production .....</b>	<b>3</b>
<b>Changes in production of apples .....</b>	<b>3</b>
<b>Trade.....</b>	<b>4</b>
<b>Consumption.....</b>	<b>4</b>
<b>Tables.....</b>	<b>6</b>
Apples – PSD.....	6
Apples – Exports .....	7
Apples – Imports.....	8
Concentrated Apple Juice – PSD .....	9
Concentrated Apple Juice – Exports.....	10
Concentrated Apple Juice – Imports.....	11

## Executive Summary

Apple production may reach 2.4 million tons this year because of favorable weather conditions as compared to the previous year. The production of CAJ is estimated to be high as well.

There were big changes in the trade of apples and CAJ in MY 2005/2006. Exports of apples were down 20 percent, and CAJ was down 5 percent. There was a considerable increase of apple imports from 1.000 ton up to 27.000 tons, due to the locally low supply of apples for processing. The imports of CAJ almost doubled compared with MY2004/2005.

Since the MY2006/2007 apple harvest and CAJ production are estimated to be high, the volume of exports in MY2006/2007 will recover from the low levels of MY2004/2005. The value of exported apples and CAJ may decrease as a result of the increase in supply.

Poland's per capita consumption of fruit and fruit products is less than half of the EU's consumption, but apple consumption is on par with EU consumption levels, and even higher than in France and Spain. The consumption of fruit juice is similar to the EU average.

## Production

Unfavorable weather conditions (ground frost, as well as cool and wet spring) resulted in lower yields in CY2005. The production of apples was down 18 percent compared with CY2004 (2,075 million tons versus 2.5 million tons in 2004).

The winter 2005/2006, although sometimes very severe (temperatures went down to minus 30 Celsius – below 0 degrees F), did not damage orchards. Wet weather in late May spread fungi illnesses, like the apple scab in small orchards. However, in big, well-protected plantations there was no damage. Specialists foresee a large harvest of apples which may reach 2.4 million tons. Because of the large harvest, prices for apples for processing could drop by 30 percent, while prices for consumption apples could drop by 15 percent.

The limited CY2005 harvest resulted in lower production of concentrated apple juice (CAJ) (20 percent down from 230,000 tons in MY2004/2005 to 185,000 tons in MY2005/2006). Poland's EU accession did not influence the price and production volume of CAJ, as it is exported and dependent on EU and world prices.

According to the Institute of Rural economics forecast, the production of CAJ in MY 2006/2007 will increase up to 235,000 tons.

## Changes in production of apples

According to the 2004 orchard production report prepared by the Polish Main Statistical Office, apples represent 71.4 percent of all orchards and 85.6 percent of the harvested fruit. However, apple production is decreasing while other fruit production is increasing.

Between 1998 and 2004, there was a considerable change in the varieties grown. Cortland, Lobo and Jonathan became less important, and were replaced by Jonagold and Champion. Also the new varieties such as Ligol and Gala also become more important. Idared is still the most popular variety with 19 percent of the total apple area, followed by Jonagold at 12 percent and Champion at 9 percent.

The majority of apples grown, 63 percent are for consumption and 37 percent are used for further processing, mainly CAJ.

Orchards in Poland vary greatly in size, though the most common are 7-10 hectares, with 18 percent of the apple orchard area in Poland. These are considered larger orchards and they are better equipped with machinery and facilities for fruit storage, including cold rooms. In 2004, about 5 percent of orchard area was irrigated.

## **Trade**

In MY2005/2006 the value of apple exports was down 16 percent as compared to the previous season. The prices were higher (EUR 0.23 per kilogram to EUR 0.24), but the volume of exported apples was over 20 percent lower. The increase of prices resulted from lower local supply and higher demand from foreign markets. The limit on fresh and dried fruits exported from Poland to Russia, that was introduced on November 14, 2005, did not influence the volume of apples exported from Poland. Exports of apples for processing was about 3,000 tons, as compared with 5,000 tons in MY 2004/2005.

The value of exported CAJ (up to EUR 225 million), was up 50 percent due to higher prices. The volume of CAJ decreased to 195,000 tons from 205,000 tons in MY2004/2005. The increase in prices resulted from a decrease of supply in Poland, Hungary and other Western European producers, as well as the higher price for Chinese CAJ this year.

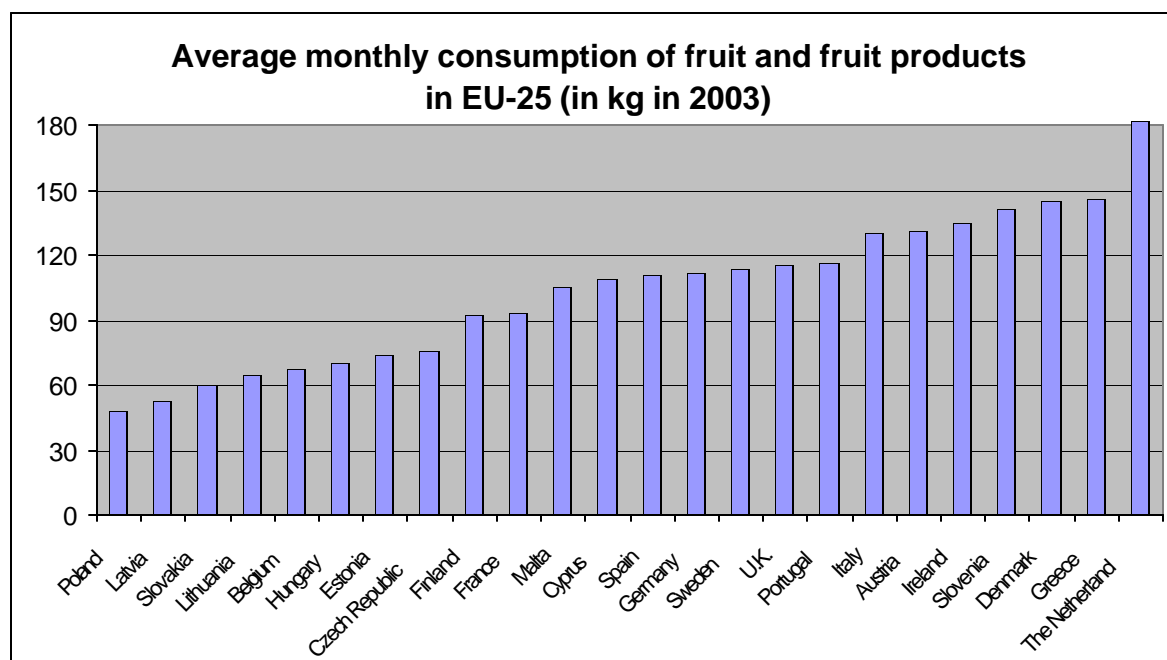
Imports of apples increased considerably in MY2005/2006, due to the increased demand of apples for processing (from 1,000 ton in MY2004/2005 up to 18,000 tons in MY2005/2006). The value of imported CAJ increased about three times, from EUR 11.6 million in MY2004/2005 up to EUR 33 million in MY2005/2006.

As the MY2006/2007 apple harvest and CAJ production are estimated to be high, the volume of exports and imports in MY2006/2007 are projected to decline. The value of exported apples and CAJ may decrease as a result of greater supply.

## **Consumption**

The prices on fruit and fruit products increased in CY2005 by 2.7 percent compared with CY2004. The price of apples increased by 1.7 percent. During first four months of CY2006, average prices of fruit and fruit products increased by 5.7 percent as compared to CY2005. Apple prices were 20.4 percent higher. However, in CY2005, retail prices of fruit and its products were lower in Poland than in most of EU-15. For example, apple prices in Poland were 62 percent lower than in Germany.

The average consumption of apples in CY2005 was 1.67 kilogram per capita (4 percent down from 1.74 kilogram in CY2004, and 16.5 percent down from almost 2 kilograms in CY2003). The consumption of apples in the second half of CY2006 is estimated to increase due to lower prices.



Source: The Institute of Rural Economics based on FAO data

Poland's per capita consumption of fruit is less than half of the average per capita fruit consumption in the EU. This is due to the lower consumption of bananas, pears and citrus fruits. Polish per capita consumption of apples is on par with the EU average, and berry consumption is higher. Fruit juice consumption is also on par with average EU consumption.

## Tables

## Apples – PSD

PSD Table							
Country	Poland						
Commodity	Apples, Fresh				(HA)(1000 TREES)(MT)		
	2004	Revised	2005	Estimate	2006	Forecast	UOM
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	
Market Year Begin		07/2004		07/2005		07/2006	MM/YYYY
Area Planted	175200	175200	180000	169700	0	170000	(HA)
Area Harvested	150000	150000	155000	145000	0	150000	(HA)
Bearing Trees	100834	162060	105000	157000	0	157250	(1000 TREES)
Non-Bearing Trees	25000	25000	25000	20000	0	19000	(1000 TREES)
Total Trees	125834	187060	130000	177000	0	176250	(1000 TREES)
Commercial Production	2300000	2381500	2170000	1945000	0	2270000	(MT)
Non-Comm. Production	140000	140000	130000	130000	0	130000	(MT)
TOTAL Production	2440000	2521500	2300000	2075000	0	2400000	(MT)
TOTAL Imports	8000	7380	6000	25403	0	8000	(MT)
TOTAL SUPPLY	2448000	2528880	2306000	2100403	0	2408000	(MT)
Domestic Fresh Consump	517000	517000	506000	506000	0	510000	(MT)
Exports, Fresh Only	531000	428143	450000	429218	0	430000	(MT)
For Processing	1400000	1583737	1350000	1165185	0	1468000	(MT)
Withdrawal From Market	0	0	0	0	0	0	(MT)
TOTAL UTILIZATION	2448000	2528880	2306000	2100403	0	2408000	(MT)

## Apples – Exports

# Export Trade Matrix

Country Poland

Commodity Apples, Fresh

Time Period	Jan-Dec	Units:	MT
Exports for:	2004		2005
U.S.		U.S.	19
Others		Others	
Russia	203,417	Russia	201,781
Belarus	30,541	Romania	37,654
Lithuania	30,170	Belarus	35,759
Slovakia	21,922	Moldova	33,280
Romania	21,715	Lithuania	21,225
Latvia	20,961	Czech Rep.	15,408
Czech Republic	20,633	Latvia	13,280
Germany	16,683	Germany	12,725
Estonia	13,843	Slovakia	11,190
Bulgaria	10,376	Ukraine	10,742
Total for Others	390,261		393,044
Others not Listed	37,882		36,155
Grand Total	428,143		429,218

## Apples – Imports

# Import Trade Matrix

Country Poland

Commodity Apples, Fresh

Time Period	Jan-Dec	Units:	MT
Imports for:	2004		2005
U.S.	9	U.S.	0
Others		Others	
Netherlands	3,378	Lithuania	5,636
Argentina	874	Netherlands	4,957
Belgium	691	Ukraine	3,871
Czech Republic	581	Germany	3,462
Chile	562	Slovakia	2,737
Slovakia	417	Moldova	1,694
Germany	211	Italy	898
Austria	177	Czech Republic	684
Italy	136	Belgium	346
Spain	91	France	230
Total for Others	7,118		24,515
Others not Listed	253		888
Grand Total	7,380		25,403



## Concentrated Apple Juice – PSD

PSD Table							
Country	Poland						
Commodity	Apple Juice, Concentrated				(MT)		
	2004	Revised	2005	Estimate	2006	Forecast	UOM
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	
Market Year Begin		07/2004		07/2005		07/2006	MM/YYYY
Deliv. To Processors	1400000	1583737	1350000	1165185	0	1468000	(MT)
Beginning Stocks	4011	4011	3000	3000	3000	1500	(MT)
Production	225806	230000	217700	185000	0	235000	(MT)
Imports	10000	13505	11300	47965	0	13000	(MT)
TOTAL SUPPLY	239817	247516	232000	235965	3000	249500	(MT)
Exports	227817	236000	220000	226965	0	238000	(MT)
Domestic Consumption	9000	8516	9000	7500	0	8500	(MT)
Ending Stocks	3000	3000	3000	1500	0	3000	(MT)
TOTAL DISTRIBUTION	239817	247516	232000	235965	0	249500	(MT)

## Concentrated Apple Juice – Exports

# Export Trade Matrix

Country Poland

Commodity Apple Juice, Concentrated

Time Period	Jan-Dec	Units:	MT
Exports for:	2004		2005
U.S.	102	U.S.	185
Others		Others	
Germany	165,414	Germany	157,339
United Kingdom	13,698	United Kingdom	18,106
Austria	13,602	Austria	15,363
Netherlands	4,971	Netherlands	8,241
Czech Republic	3,908	Czech Republic	7,831
Norway	2,677	Slovakia	4,858
Sweden	1,591	Norway	2,949
Italy	1,575	Finland	2,829
Finland	1,286	Lithuania	2,661
Lithuania	1,244	Hungary	2,460
Total for Others	209,966		222,637
Others not Listed	26,793		14,056
Grand Total	236,861		236,878

## Concentrated Apple Juice – Imports

# Import Trade Matrix

Country Poland

Commodity Apple Juice, Concentrated

Time Period

Jan-Dec

Units:

MT

Imports for:

2004

2005

U.S.

U.S.

Others

Others

Romania	4,014	Germany	11,783
Croatia	3,359	Romania	10,208
Germany	2,307	Netherlands	5,437
Hungary	1,477	Moldova	4,158
Moldova	550	Italy	4,076
Turkey	437	Russia	3,264
Ukraine	234	Croatia	2,396
Austria	204	China	1,539
Lithuania	149	Lithuania	1,090
Netherlands	132	Hungary	818

Total for Others

12,863

44,769

Others not Listed

642

3,196

Grand Total

13,505

47,965